

2015 Advertising Effectiveness & ROI Topline

March 2016

The “Made in Tennessee” ads are good, as evidenced by high creative ratings.

Communication Attributes

Evaluate key ad messaging. Fewer than one-fourth of state tourism campaigns receive an average communication rating of 4.1 or higher.

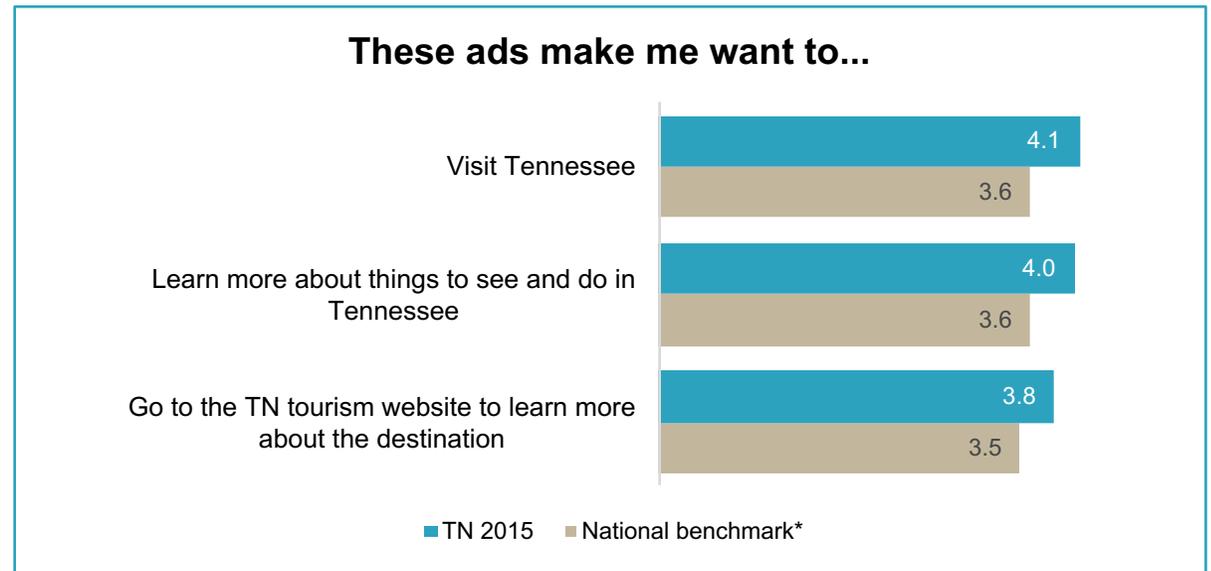
These ads...	TN 2015	
Are believable	4.2	
Make Tennessee seem like it has something for every member of the family	4.2	
Fit the way I think about Tennessee	4.1	National benchmark*
Make me think about Tennessee in a different way	3.8	
Average	4.1	3.9

Shown are mean ratings on 1-5 scale where 1 = strongly disagree and 5 = strongly agree.

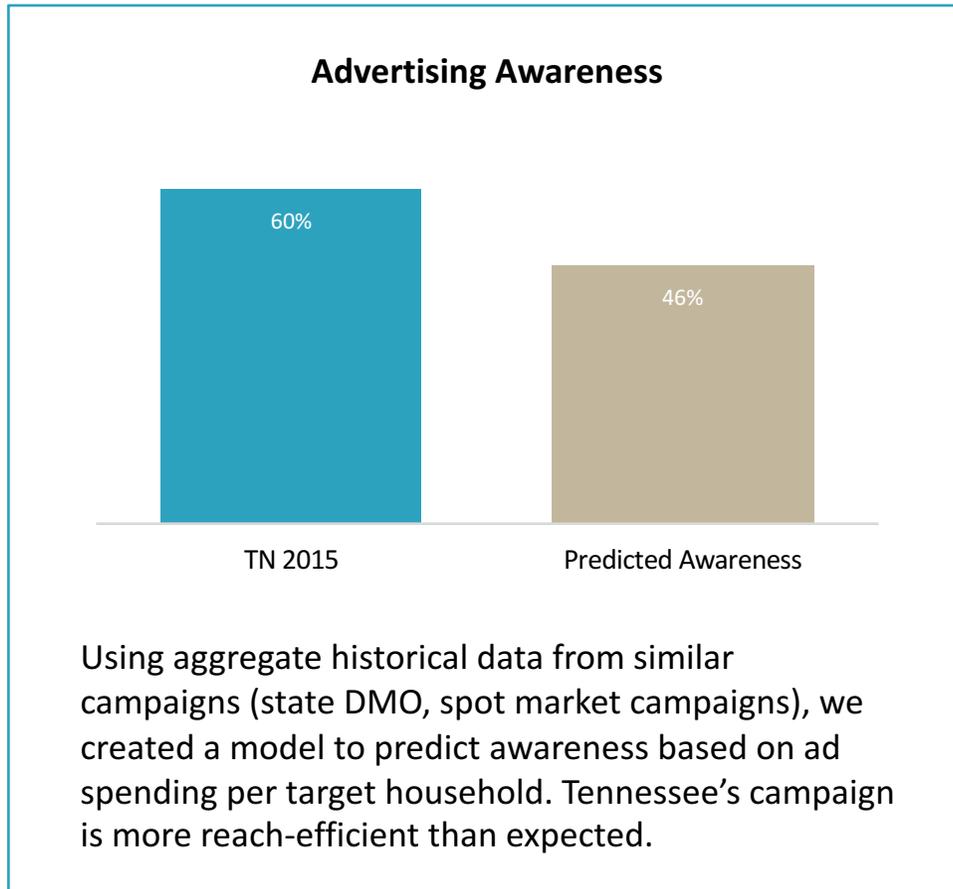
* Average of creative ratings for state tourism campaigns

Impact Attributes

Evaluate the ability of ad messaging to generate greater interest in visiting the destination and to motivate planning behaviors in support of that interest. (SMARInsights has found that behaviors are typically harder to shift than perceptions, which explains why the benchmarks for impact attributes are lower than for communication attributes.)



The media plan is also strong, generating strong awareness, and doing so efficiently.



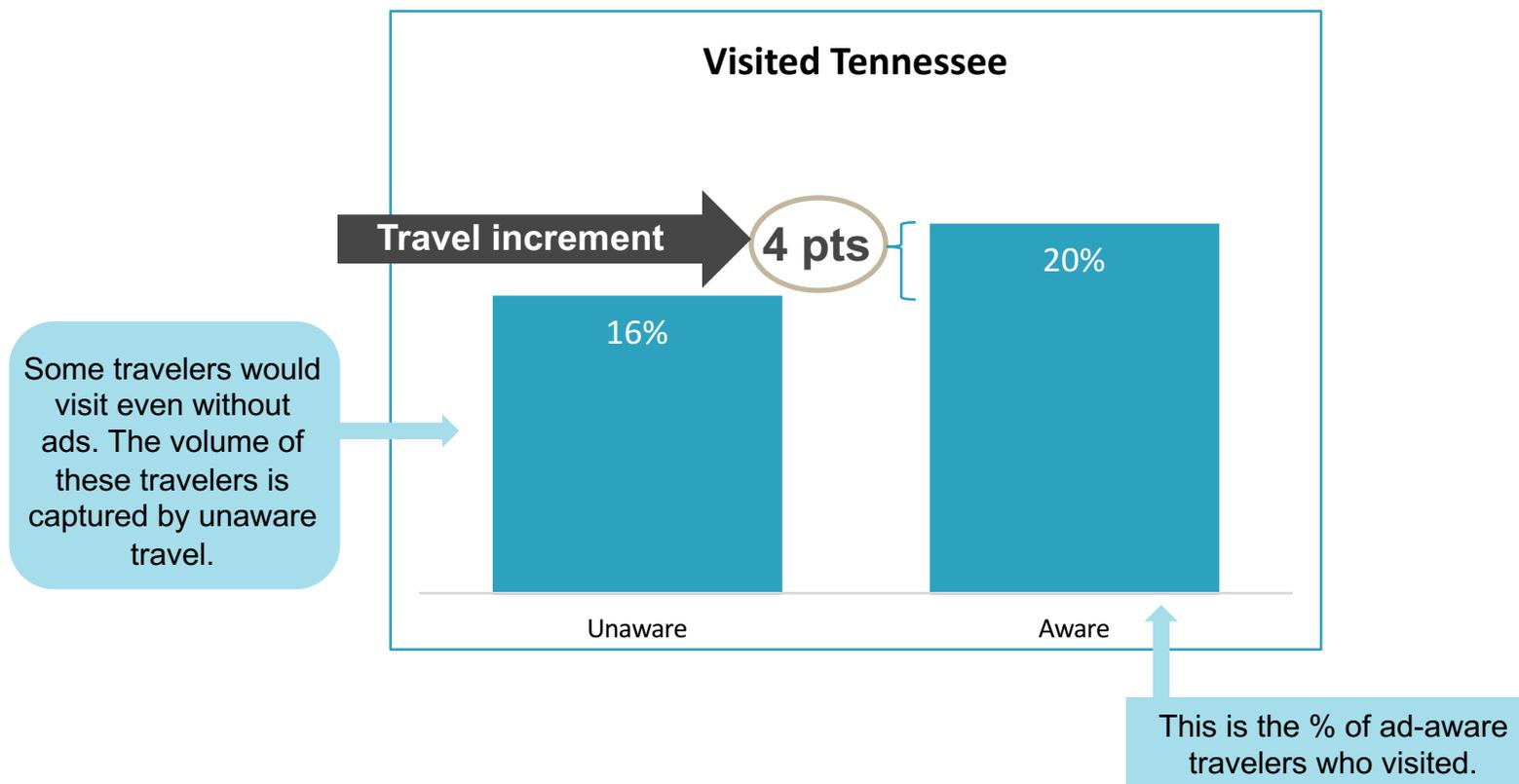
Cost per Aware Household Calculation	TN 2015	
Traveling households	31,963,357	
Awareness	60%	
Aware households	19,330,842	
Campaign spending	4,161,714	National benchmark*
Cost per aware household	\$0.22	\$0.67

Tennessee spent a third less than the average state DMO to reach a traveling household with its advertising message.

* Average for state spot market campaigns

The campaign had a strong impact on travel in the target markets.

The 4-point travel increment corresponds to more than 850,000 Tennessee visits that would not have occurred without the advertising.



The net result of strong creative and a strategic media plan is a substantial ROI.

Tennessee’s 2015 ROI is 51% higher than the average ROI for state tourism campaigns, and the tax ROI is twice that of the average campaign. Both measures are in line with the 2011 campaign’s \$262 ROI and \$19 tax ROI.

	TN 2015	
Aware HHs	19,330,842	
Increment	4%	
Incremental trips	859,093	
Trip spending	\$1,110	National benchmarks*
Economic impact	953,993,423	
ROI	\$229	\$152
Tax Impact	\$73,457,494	
Tax ROI	\$18	\$9

* Average for state tourism marketing campaigns.